

CM/ECF Maintain User Accounts

For Attorneys and Trustees

All CM/ECF users will be issued an account with a user login and password. The CM/ECF login provides registered users the ability to submit pleadings electronically to the court. Public users (attorneys and creditors) must also log into PACER to inquire on cases or look at reports. Existing PACER logins and passwords will be accepted.

Non-court users can access their own account information through the Maintain Your ECF Account menu. Using this option, participants can update their name, mailing and E-mail addresses, phone and fax numbers, and password. Users can therefore control the accuracy of their own information in a timely manner.

This module explains how attorneys and trustees can update:

- ◆ user name, address and other party data
- ◆ E-mail information
- ◆ electronic noticing preferences
- ◆ user passwords.

STEP 1 After clicking on **Utilities** on the CM/ECF Main Menu bar, select Maintain Your ECF Accounts, which is found under the **Your Account** sub-menu. (See Figure 1.) Your UTILITIES screen may vary from the one displayed in this example.

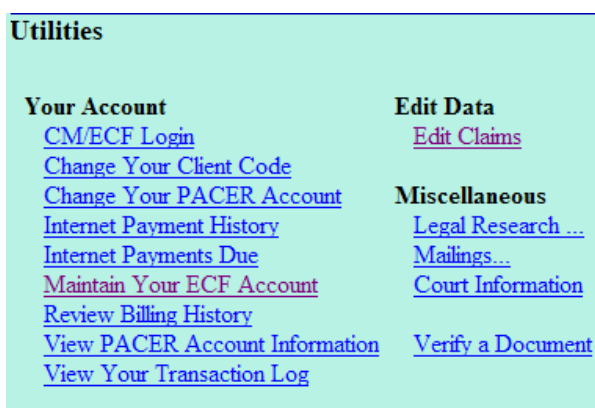
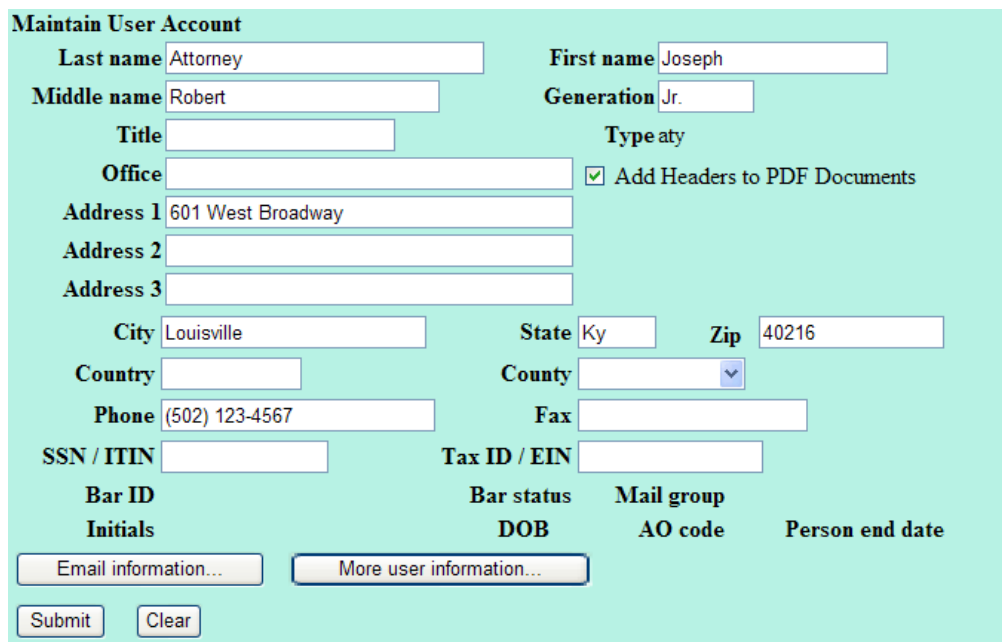


Figure 1

STEP 2 Your user account screen will appear displaying your current account information. (See Figure 2.)



The image shows a web form titled "Maintain User Account" with a light blue background. The form contains various input fields for user information. The fields are organized as follows: Last name (Attorney), First name (Joseph), Middle name (Robert), Generation (Jr.), Title (empty), Type aty (empty), Office (empty), Add Headers to PDF Documents (checked), Address 1 (601 West Broadway), Address 2 (empty), Address 3 (empty), City (Louisville), State (Ky), Zip (40216), Country (empty), County (dropdown menu), Phone ((502) 123-4567), Fax (empty), SSN / ITIN (empty), Tax ID / EIN (empty), Bar ID (empty), Bar status (empty), Mail group (empty), Initials (empty), DOB (empty), AO code (empty), and Person end date (empty). At the bottom, there are two buttons: "Email information..." and "More user information...". Below these buttons are "Submit" and "Clear" buttons.

Last name		Attorney		First name		Joseph	
Middle name		Robert		Generation		Jr.	
Title				Type aty			
Office				<input checked="" type="checkbox"/> Add Headers to PDF Documents			
Address 1		601 West Broadway		Address 2			
Address 3				City		Louisville	
		State		Ky		Zip	
				40216			
Country				County		▼	
Phone		(502) 123-4567		Fax			
SSN / ITIN				Tax ID / EIN			
Bar ID				Bar status		Mail group	
Initials				DOB		AO code	
						Person end date	
Email information...				More user information...			
Submit		Clear					

Figure 2

- ◆ Update your personal information on this screen. When it is correct, click **[Submit]** to save the changes. If the **[Submit]** button is not used, the record will not be modified.
- ◆ The **[Email information...]** and **[More user information]** buttons provide further screens to modify your user profile. The following pages will explain these features in more detail.

STEP 3 The E-MAIL INFORMATION screen presents options for control of your electronic notification on each court's CM/ECF system. (See Figure 3a.)

The screenshot shows the 'E-mail information for Joe Attorney' screen. At the top is a blue navigation bar with the 'CM/ECF' logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area has a light blue background. It starts with the title 'E-mail information for Joe Attorney'. Below this is a text input field for 'Primary e-mail address' containing 'jattorney@kywb.uscourts.gov'. Underneath is a section 'Send the notices specified below' with two checkboxes: 'to my primary e-mail address' (checked) and 'to these additional addresses' (unchecked). Below these are two more checkboxes: 'Send notices in cases in which I am involved' (checked) and 'Send notices in these additional cases' (unchecked). Then there are two radio buttons: 'Send a notice for each filing' (selected) and 'Send a Daily Summary Report' (unselected). Next is a 'Format notices' section with two radio buttons: 'html format for Netscape or ISP e-mail service' (selected) and 'text format for cc:Mail, GroupWise, other e-mail service' (unselected). At the bottom are two buttons: 'Return to Account screen' and 'Clear'.

Figure 3a

You can request e-mail copies of notification on all cases to which you are a party or only on specific cases. You can receive e-mail activity throughout the day or a daily summary of all noticing activity. "All activity" includes notification of claims as well as other entries to a case. Each e-mail will include the case number and name of the docket entry in the subject line of the mail message.

Each section on the E-MAIL INFORMATION screen is explained below:

- ◆ **Primary e-mail address.** This address must be formatted to Internet protocol or an error will be generated. It may be prudent to establish a separate e-mail account for CM/ECF activity from your routine e-mail correspondence.
- ◆ **Send the notices specified below...**
 - **To my primary e-mail address**
To activate CM/ECF notification you must first check the box next to your e-mail address.

- ☐ **To these additional addresses**
You may have notices sent to other e-mail addresses besides your primary e-mail address. (Paralegals or chambers staff may want to share this notification activity.) When entering multiple e-mail addresses, separate each address with a semi-colon.
- ☐ **Send notices in cases in which I am involved**
Checking this box will automatically inform the user when any filing has been submitted in a case where this person is a participant. Chapter 7 panel trustees and offices of the U.S. Trustee may find this advantageous for new filings as well as routine case activity.
- ☐ **Send notices to these additional cases**
You do not have to be a participant in a case to receive notification of activity. Trustees and attorneys can elect to be notified of activity in cases in which they have an interest but are not parties to the case. Court and chambers staff can monitor cases through this process also. It is possible to select both options.

NOTE: This list is maintained by each user. As you are involved in more cases or as cases close, you must update this screen.

- ◆ **Send a notice for each filing**
Checking this box means you will receive e-mail notices when activity occurs throughout the day to the account(s) specified above. The title of the e-mail will describe the type of filing and the case number.
- ◆ **Send a Daily Summary Report**
A comprehensive list of one day's activity can be sent once a day. Notifications for claims will also be included in this mail list. **(See Figure 3b.)**

A Summary report includes the case numbers and titles of cases in which activity occurred for that day. The text of the summary e-mail notification will display the docket event and the document number (including the hyperlink).

NOTE: You cannot elect to receive both separate notices and the summary report.

Bruce Williams	11/26/2001	8511	Summary of ECF Activity
99-11228-lmc Michael Holdman and Wendall Holdman Notice of Appearance 5 5-01-50021-lmc John Aadams and Mary Aadams Proof of Claim Filed 1 5-01-50021-lmc John Aadams and Mary Aadams Proof of Claim Filed 2			

Figure 3b

◆ **Format notices**

Enter the e-mail delivery method. This selection will be determined by your e-mail type.

☐ **html format for Netscape or ISP e-mail servicer**

The html format will include hyperlinks to the document or claim.
(See Figure 3c.)

Trustee action:
[99-10000 Dale X. Daniels](#)

Notice of Electronic Filing

Case Name: Dale X. Daniels
Case Number: [99-10000](#)
Document Number: [3](#)

Figure 3c

☐ **Text format for cc:Mail, GroupWise, other e-mail service**

Text format will feature the URL of the PDF document which can be copied and pasted into the location bar of your browser.
Figure 3d shows an example of a text formatted notice.

Notice of Electronic Filing
The following transaction was received from Abraham P. Bellows on 1/23/2001 at 3 :51 PM CST

Case Name: William Wonka
Case Number: 97-13259 <https://bkecf-train.aottsd.uscourts.gov/cgi-bin/DktRpt.pl?252>
Document Number: 2
Copy the URL address on the line below into the location bar of your Web browser to view the document: https://bkecf-train.aottsd.uscourts.gov/cgi-bin/show_case_doc?2,252,,169281,

Figure 3d



When you have entered your e-mail preferences, click on **[Return to Account screen]** to save the data.

The screen in **Figure 3e** is used to confirm the information which has been submitted. If you checked any of the boxes for sending notices for each filing, or sending a Summary Report, this screen will indicate the option is turned "on".

Any additional case numbers (and hyperlinks) will be displayed under the **Case list:** heading. If invalid case numbers were entered, you will receive an error message after submitting the data and be given the chance to back up and enter a valid number.

The screenshot shows the CM/ECF web interface. The top navigation bar includes links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area displays the following information:

- Updating person record...
- Update Person Prid: 333288
- The update was successful... prid 333288 - Kerry Ledford
- Updating user record
- The user update was successful
- Set up automatic e-mail notification complete for Kerry Ledford
- Send Notification in all cases for which you represent a party = on
- Send Notification to primary e-mail address = on
- Case list:
 - [00-10122 Dale A. Daniels](#)
 - [00-12243 George Stephanopolous](#)
- E-mail notice of electronic filings for selected cases= on
- Summary e-mail = on
- Primary e-mail Address: ledfordk@aottd.uscourts.gov
- Additional e-mail Address:

Figure 3e

- STEP 4** If you click on **More user information** from your account screen, your login and password information will be displayed (**See Figure 4**)

More User Information for Joseph Robert Attorney Jr.

Login jattorney	Last login 08-28-2008 15:11
Password *****	Current login 09-04-2008 15:11 Create date 09/11/2002
Registered Y	Update date 10/26/2006
Internet Credit Card Y	
Groups Attorney	

Figure 4

- ◆ The login and password is assigned by the court. The user can change their password here.

Remember:
 - Logins and passwords are case sensitive;
 - These are alphanumeric fields;
 - Passwords have a maximum of 8 characters;
 - When you enter a new password it is displayed on the screen. Your subsequent queries to this screen will show only asterisks. (No one will be able to tell you what your password is. Contact the court if you forget your password.
- ◆ When you have entered the information as desired, click on **[Return to Account screen]**.

STEP 5 Your user account screen will appear again (See Figure 5.)

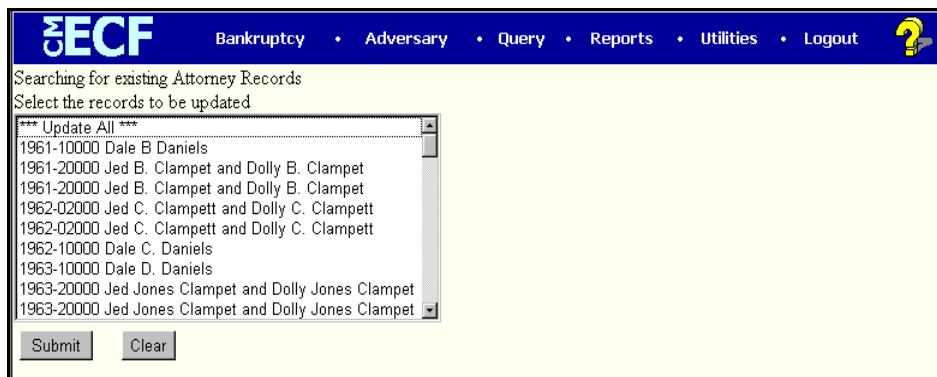
The screenshot shows the 'Maintain User Account' form with the following fields and values:

ECF				Bankruptcy • Adversary • Query • Reports • Utilities • Logout				?
Maintain User Account								
Last name		Attorney			First name		Joe	
Middle name					Generation			
Title					Type		att	
Office								
Address 1		601 West Broadway						
Address 2								
Address 3								
City		Louisville			State		KY	
					Zip		40303	
Country					County			
Phone		502-555-5555			Fax		502-444-4444	
SSN		000-00-0000			Tax Id			
Bar Id					Bar status		Mail group	
Initials		DOB			AO code		End date	
Email information...				More user information...				
Submit				Clear				

Figure 5

- ◆ When all of your account information is correct, click **[Submit]** to finish processing.

STEP 6 A list of the cases you are associated may appear (See Figure 6.)



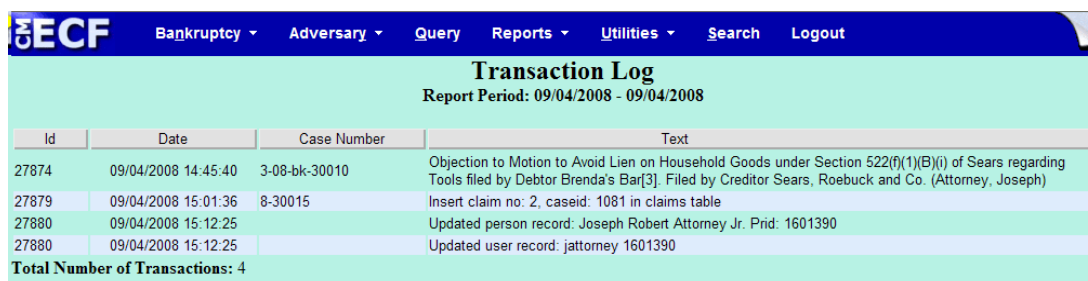
The screenshot shows the CM/ECF system interface. At the top is a blue navigation bar with the text "Bankruptcy • Adversary • Query • Reports • Utilities • Logout" and a yellow question mark icon. Below the bar, the text "Searching for existing Attorney Records" and "Select the records to be updated" is displayed. A list box contains the following items: "*** Update All ***", "1961-10000 Dale B Daniels", "1961-20000 Jed B. Clampet and Dolly B. Clampet", "1961-20000 Jed B. Clampet and Dolly B. Clampet", "1962-02000 Jed C. Clampett and Dolly C. Clampett", "1962-02000 Jed C. Clampett and Dolly C. Clampett", "1962-10000 Dale C. Daniels", "1963-10000 Dale D. Daniels", "1963-20000 Jed Jones Clampet and Dolly Jones Clampet", and "1963-20000 Jed Jones Clampet and Dolly Jones Clampet". Below the list box are two buttons: "Submit" and "Clear".

Figure 6

- ◆ If you want this new information to apply to all of the cases, click on *****Update All***** at the top of the list. To change information only on certain cases, hold down the **[Control]** key after selecting the first case number and click on the others, one at a time, to highlight them.
- ◆ When you have all of the desired cases or *****Update All***** highlighted, click **[Submit]** to apply the new information.
- ◆ The system will update the records and inform you that they were updated. You can then click on another selection in the **CM/ECF Main Menu Bar**.

VIEW YOUR TRANSACTION LOG

All docketing activity is recorded through each user's **View Your Transaction Log**. This feature is found under Utilities on the CM/ECF Main Menu Bar. Information on this log can be selected by date range. A typical excerpt from a transaction log is displayed below. (See Figure 7.)



Id	Date	Case Number	Text
27874	09/04/2008 14:45:40	3-08-bk-30010	Objection to Motion to Avoid Lien on Household Goods under Section 522(f)(1)(B)(i) of Sears regarding Tools filed by Debtor Brenda's Bar[3]. Filed by Creditor Sears, Roebuck and Co. (Attorney, Joseph)
27879	09/04/2008 15:01:36	8-30015	Insert claim no: 2, caseid: 1081 in claims table
27880	09/04/2008 15:12:25		Updated person record: Joseph Robert Attorney Jr. Prid: 1601390
27880	09/04/2008 15:12:25		Updated user record: jattorney 1601390

Total Number of Transactions: 4

Figure 7

This record may be useful in researching case filings. Dates, case numbers, times and document type are tracked.

Your transaction activity is not accessible to other users besides yourself except for court systems staff.